Solicitation Number: SCC060001-A1

Statewide Research and Survey Services

Category 3.1.6. Customer and/or employee satisfaction research

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Strategic Contracting Centers
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Phoenix, Arizona 85007

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Experience and Expertise—3.1.6. Customer and/or employee satisfaction research

Overview of Experience and Expertise

LeCroy & Milligan Associates, Inc. (LMA) has the breadth of experience and a service philosophy that is well suited to the variety of services requested in the solicitation. For the past 14 years, LeCroy & Milligan Associates has provided research, evaluation, planning and training services for state, federal and local agencies in a variety of project areas.

The combined personnel of our organization provide a unique balance of individuals that have the analytical, statistical, and substantive expertise to respond to the demands of the RFP and produce exceptional consultation and project services. Project teams are formed to include staff members whose unique experience is most needed by a particular project.

Our staff comprise a multi-disciplinary team with professional backgrounds in psychology, social work, public health, juvenile justice, education, public administration, family studies, and management information systems. Our staff's backgrounds include *direct* program development and administrative experience as well as *consultation* in research. This experience enables us to understand the *practical and practice* issues involved in human services. Also, our work is not dependent on one person but rather involves an entire team to provide the service or product. This provides clients with additional assurance that our work will be completed in a timely and efficient manner.

We have a staff of 21 full-time and 2 part-time employees that work efficiently and effectively in designing and carrying out research, planning, and consultation projects. Because we use a team approach in our work, the burden does not fall exclusively on one evaluator to complete work, and thus we can be efficient and timely in our work. Our team includes:
1 President/Evaluator, MSSW
1 Executive Director/Evaluator, PhD
5 Evaluation Associates, Master's Degrees and PhDs
3 Evaluation Specialists, BA
1 Computer Systems Manager, BS
1 Business/Operations Manager
3 Data Entry Specialists
7 Quality Assurance & Training Team Members, 3 Master's Degrees

LeCroy & Milligan Associates maintains a well-established office in Tucson, Arizona. The offices are connected with a local area computer network with state-of-the-art word processing equipment, and use Microsoft products, SPSS, Epi-Info, ArcView GIS mapping software, and Dreamweaver software. We also have access to large mainframe computers when needed. Our computer and personnel capacity and experience allows us to process and enter large data sets if needed. Our office has a conference room available for meeting and training when needed. We have a large library of evaluation, prevention and training materials. We have two fax machines to receive documentation and we are available by phone, fax, or email.

Our staff have access to numerous on-line and library resources for reference needs. We have DSL Internet connections with virus and security protection updated regularly. We maintain three websites and regularly post reports, written materials, training materials, and relevant links. We have developed a web platform for training modules used nationally. We use Dreamweaver software for creating secure web-based access for online data collection.

Experience and expertise in Customer and/or employee satisfaction research

LeCroy & Milligan Associates has designed and completed outcome and process evaluations for small and large projects, from evaluations of local community based programs to statewide, multi-site, multi-year evaluations. In each study, customer and staff satisfaction with the program, service or product was an important indicator of success that we measured. A selection of projects is highlighted below.

<u>Healthy Families Arizona (Department of Economic Security (DES) (1991-present)</u>—a 14-year project including process and outcome evaluation of home visitation program in 48 sites across Arizona. Several years ago, we completed a qualitative interview study with over 50 mothers who participated in the program. We conducted interviews in the participants' homes, taped and transcribed results, conducted analysis of the qualitative data, and published the report. The findings were instrumental in identifying qualities and behaviors in home visitors that contributed to the mother's satisfaction with services and were used to focus training with home visitors. Over the years, we have also conducted focus groups with program staff to understand qualities that lead to job satisfaction and retention. **Key personnel**: Craig LeCroy, Judy Krysik, Kerry Milligan, Allison Titcomb, Pat Canterbury, Hilary Smith, Cindy Jones. Olga Valenzuela, Kate Whitaker, Pauline Haas-Vaughn.

<u>Abstinence Only Program Evaluation, Arizona Department of Health Services, (1998-present)</u> — Over the course of 7 years of program evaluation, we completed survey data collection in over 170 schools throughout Arizona, administering written surveys to over 100,000 youth and adult participants. In addition to questions about specific risk behaviors, the surveys included a section on satisfaction with the program. Focus groups were also conducted with students in middle and high schools around the state. Information gleaned from satisfaction data was instrumental in training the abstinence educators in "what works" to gain credibility and acceptance in the classroom. Surveys were carefully reviewed for language, age and cultural appropriateness. We developed surveys for adult participants, parents, and key stakeholders regarding perceptions of the program. We surveyed over 200 principals and school administrators about their perceptions of the often-controversial program. For four years we conducted developed and managed a statewide telephone survey to assess effectiveness and satisfaction with a media campaign promoting the prevention messages of the initiative. **Key personnel:** Pat Canterbury, April Hizny, Kerry Milligan, Craig LeCroy, Cindy Jones, Olga Valenzuela, Judy Krysik, subcontractor

P<u>ima County Juvenile Probation evaluation</u>. (2003) A multi-faceted evaluation to examine the overall effectiveness of the probation services offered by the Pima County Juvenile Court that addressed four main components: the impact of case compliance and probationer status on recidivism; a literature review of best practices; and three large-scale telephone surveys with victims, family members and the general public regarding perceptions of the department's effectiveness. The evaluation included interviews, analysis of extracted JOLTS data, surveys, and case file reviews of 450 juvenile records. **Key personnel**: Craig LeCroy, Olga Valenzuela, John Hepburn, subcontractor

Arizona Family Group Decision Making (FGDM) program evaluation (DES)—a three-year study (2001-2003) of process and outcomes of the FGDM program in all DES districts in Arizona. As part of the process study, we interviewed program staff about their perceptions of strengths and challenges of their jobs and the program, resulting in a series of recommendations for improvements in program structure, staff training and supervision. We also conducted site visits, observations of family group conferences, analysis of CHILDS data to assess dependency outcomes, and yearly reports and presentations. **Key personnel**: Allison Titcomb, Cindy Jones, Olga Valenzuela, Kerry Milligan.

Two Pima County needs assessment projects, Access to a Pediatric Home for the Homeless Focus Group Study (2002*)* and the Tucson Planning Council Homeless Youth Survey (2005) included focus groups as the main source of data collection to gather information about satisfaction with and utilization of community health and social services for homeless youth. **Key personnel:** Hilary Smith, Allyson LaBrue, Craig LeCroy

OASIS Center for Sexual Assault and Relationship Violence program evaluation (University of Arizona).(2002-2003) During this two-year project we developed focus group protocols and key informant interview guides to assess the needs and perceptions of the Center among "consumers" and community collaborators. This information provided information for strategic planning for outreach, education, and prevention efforts with college students and staff. **Key personnel**: Allison Titcomb,

Nevada Department of Health Services "Real Choices" Needs Assessment. (2004-2005) LeCroy & Milligan Associates completed a project for the state of Nevada, a needs assessment of the health care systems serving children with special health care needs (CSHCN) . This project includes an extensive survey and assessment of current and past service delivery models and planning approaches that have implemented in Nevada and other states. In order to complete this task we will examine and contrast existing models, frameworks and literature . Major needs, assets and changes in the delivery of services were reflected in this assessment, with the information being used by state agency planners for improving the Nevada systems. The multi-method assessment includes a literature review, gathering of secondary source data, surveys of providers and consumers, focus groups with providers and consumers, key informant interviews, and workshops and reports for disseminating results.
Key personnel: Pat Canterbury, Allison Titcomb, April Hizny

References

1) **Client Organization/Contact person**
Arizona Department of Economic Security
Rachel Whyte, Program Manager, Healthy Families Arizona
(602) 542-1563
Paula T. Wright, Statewide Coordinator, Family Group Decision Making Program
Phone: (602) 364-1761
Project Descriptions
Healthy Families Arizona Evaluation. A statewide evaluation involves 48 sites, with over 8500 total families to date. This project has included process and outcome studies, credentialing work, and quality assurance and training components.
Project Dates: 1991 to present.
*Family Group Decision Making program evaluation***.** Three-year study of process and outcomes of the family group conferencing program implemented through DES districts statewide. **Project Dates:** 2001-2003

2) **Client Organization/Contact person**
Arizona Department of Health Services
Sara Rumann, Program Manager
(602) 364-1400
Project Description/Project Dates: *Arizona's Abstinence Only Program evaluation* was a program evaluation of abstinence only education involving 18 sites, 172 schools, 600 locations, surveys of 100,000 participants on sexual risk and protective factors, four annual telephone media surveys, and provider and stakeholder surveys.
Project Dates: 1998-2003, 2004 -present

3) **Client Organization/Contact person**
Nevada Department of Health Services
Debra Wagler, Health Program Manager for Real Choices Systems Change Project
Bureau of Family Health Services
3427 Goni Road, Suite 108
Carson City, NV 89706
Phone: 775-684-3479
Project Description
Nevada Needs Assessment of Children with Special Health Care Needs. A statewide needs assessment regarding availability and accessibility of community based services for children and their families.
Project Dates: August 2004-June 2005

4) **Client Organization/Contact person**
Pima County Juvenile Probation Department
Karen Godzyk
Phone: (520) 740-2094
Project Description: *Pima County Juvenile Probation evaluation.* A multi-method study which included three large-scale telephone surveys with victims, family members

and the general public regarding perceptions of the department's effectiveness, a comprehensive literature review of juvenile treatment approaches, a single system design study with probation officers, and a recidivism study requiring mining of the JOLTS (juvenile on-line tracking system).
Project Dates: June 2002- June 2003

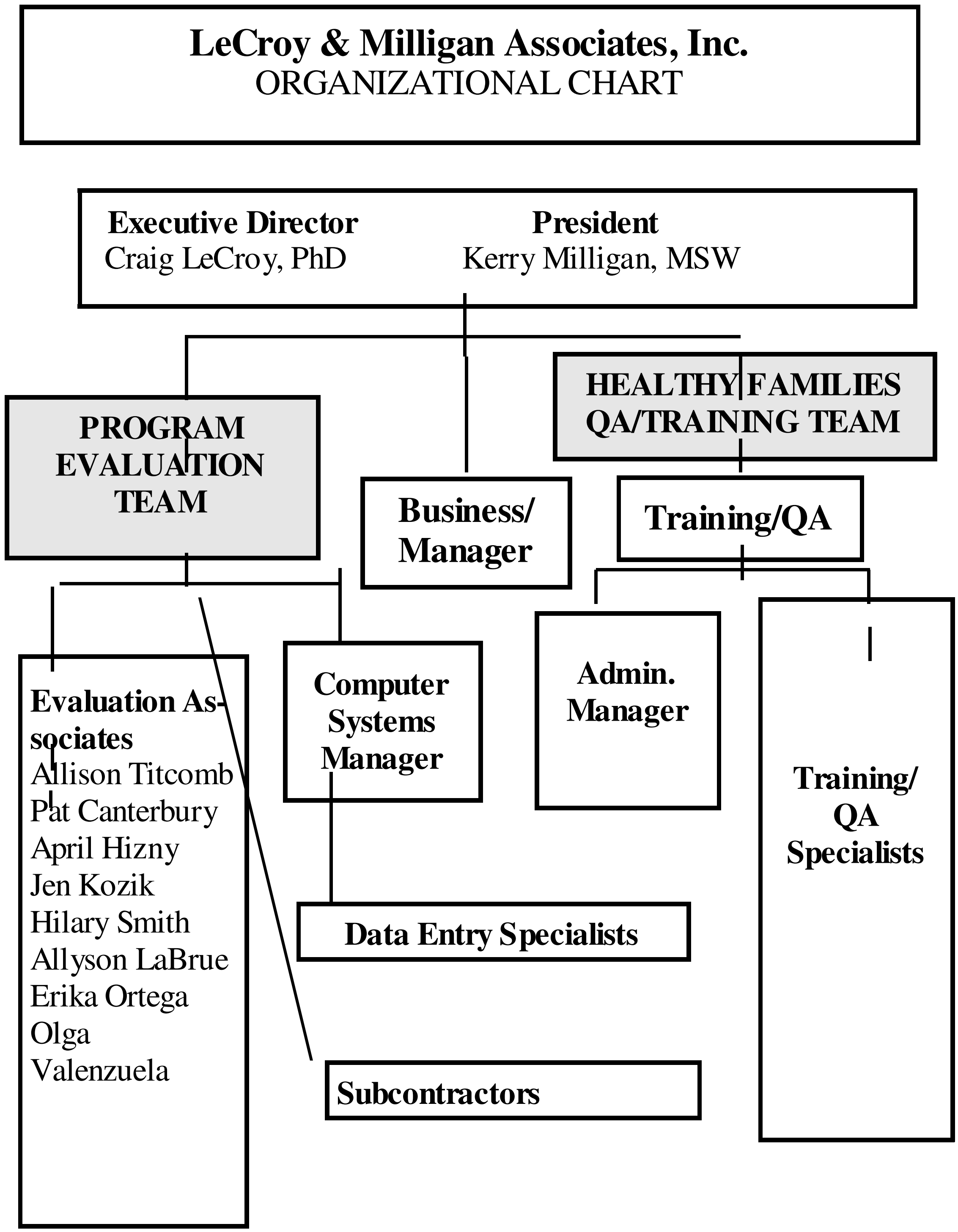
5) **Client Organization/Contact person**
Tomas' Leon, Executive Director
Youth on Their Own
Tucson, Arizona
Phone: 520-293-1136
Project Description: *Homeless youth survey* for the Tucson Planning Council for the Homeless. Surveys, focus groups, interviews to assess needs of homeless youth and conduct strategic planning.
Project Dates: September 2004-present

Resumes of key personnel
Resumes of the following key LeCroy & Milligan Associates staff are attached.

Kerry Milligan, MSSW
Craig LeCroy, Ph.D.
Allison Titcomb, Ph.D.
Pat Canterbury, MPH
April Hizny. BA
Jen Kozik, MPH
Hilary Smith, MA
Cindy Jones BA, MIS
Allyson LaBrue. BA
Erika Ortega, BA
Olga Valenzuela. BA

Potential Subcontractors:

- FMR Associates, Inc. Tucson, Arizona. Founded in 1981, FMR Associates, Inc. specializes in strategic research for the communications industry. We have used them for random-digit dial telephone surveys.
- Judy Krysik, Ph.D.



Note: The Project team leader is chosen from evaluators for each project, and supervises the project.

Method of Approach—3.1.6. Customer/Employee Satisfaction Research

Customer satisfaction is an important indicator of the success of a product, service, or program. However, customer satisfaction data is often most useful when it is accompanied by other performance indicators as well. Much of our work in customer and employee satisfaction has been within the context of larger assessment projects. It is essential that clear, well-defined performance indicators (outcome measures) be developed and agreed upon by key program stakeholders. LeCroy & Milligan Associates, Inc. will work with stakeholders to clarify and establish relevant and realistic outcome measures or performance indicators. In conjunction with this work, we incorporate findings from the literature reviews to identify appropriate outcome measures and search for additional indicators that may prove useful for a study or evaluation. The general notion is that outcome measures should be consistent with common sense and compelling not only to experts, but to those others who support and use the program, service or product as well. Also, outcomes need to authentically reflect the purposes to be achieved because often what gets measured has a great effect on what gets done.

It is critical to obtain information about the program participants' or consumers' perceptions of the program—how they assess their experience. Knowing what they like or dislike and what is helpful in the program can provide critical information for program improvement. Customer satisfaction research can encompass surveys, focus groups, interviews and analysis of secondary source data. A brief overview of our approach in these methods follows.

Survey planning and design
LeCroy & Milligan Associates (LMA) has developed, conducted and analyzed numerous consumer and provider/employee surveys. LMA determines the variables of interest in the survey project through a comprehensive team approach, which includes the stakeholders' input and feedback. We work to identify the stakeholders' most important variables of interest, because they will be the focus for measurement. Inevitably, there are limited resources for survey work. A key to an efficient survey research project is to focus on the most important variables to measure, and to measure them well.

LeCroy & Milligan Associates develops and administers surveys in a variety of methods, including phone, on-line or web-based, mail, paper and pencil, focus groups or face-to-face interviews. Surveys may be used to gather information about behaviors, attitudes, or knowledge which is then used to obtain reactions to services and products, or for needs assessment, program development or evaluation. LMA will use a systematic process to design, develop and execute the survey research tools and instruments with the objectives of maximizing survey validity and reliability. The proposed steps in this process include:

1. The selection of a team of LeCroy & Milligan personnel and/or potential subcontractors based on specific survey research expertise (e.g., experience with the target group, survey design expertise, sampling design, formatting specialists, data analysis).
2. The designated lead evaluator will coordinate an organizational meeting with the client to exchange ideas about the project needs, methods and instruments. We gather existing instruments that may be designed to measure the areas of interest and determine if items

may be adopted with permissions or adapted in the new survey instruments. The LMA team would then adapt or create the survey questionnaires or instruments. The instruments would be translated into Spanish or other languages if needed.

3. The LMA team would pretest and further revise the questionnaire based on feedback. The pretest process will also allow pretesting the instructions for completion. After completion of the questionnaire, the participants might be asked questions in a group format, including their sincerity in answering the questions, suggestions for alternative wording, etc. The survey questions will be revised based on the pretest results. LeCroy & Milligan Associates will prepare a fully refined version of the survey, including instructions for administration. The revisions must be made keeping in mind the objectives of decreasing response error and increasing respondent motivation.
4. Once the final survey is completed, the format would be executed, for example, hard copy survey, phone interview guide, on-line survey, or email survey.
5. Prior to administration (phone, online, mail), quality assurance processes to insure data integrity would include data collection protocol manuals, training data collection staff, outlining the data tracking and monitoring systems and data cleaning procedures.
6. Depending on the size of the project, shortly after data collection begins we conduct quality checks on the integrity of the data gathered.
7. Analyze the data
8. Share and use the results

For each project, we select a team of at least two LeCroy & Milligan Associates staff to coordinate the research project, design a data collection and data analysis plan.

Samples

The development and application of the sample design are essential to ensure that the data collected accurately. LMA proposes to use the experience of their in-house team of research specialists, informed by the expertise of a statistical sampling expert if needed.
Sampling of survey participants depends on the scope and research questions for the survey project. LMA can use sampling techniques for estimating and obtaining adequate representation of the population that is necessary for detecting significant differences among the outcomes of interest. Our staff have expertise in conducting power analysis for estimating the sample size needed for various types of survey study designs.

For many projects survey data can be collected, compiled and analyzed by geographic area. Using software such as ArcView or Excel, the data can be represented in graphical form with maps or charts, depending on the clarity of the method for communicating the pattern of the socioeconomic variables to be displayed. For example, if there are large differences by county or by region within a county, a map could effectively "tell" that story. If the socioeconomic breakdown is more complicated and related to variables other than geography (e.g., presence of specific advocacy groups), then charting by variable category may be more appropriate.

Data analysis of survey data

Part of the research plan includes a data analysis plan that details the steps and methods for analyzing the data. The selection of these methods depends on the following:

- The needs of the client (primary research questions and type of information needed)
- The type of the data collected (e.g., qualitative vs. quantitative)
- The sample size
- Project timeline.

Qualitative Data Analysis. If the data collected is primarily qualitative, e.g., open-ended survey questions, then content analysis may be used to organize the data around the major questions or themes in the narrative, or text under analysis.

We have several staff with experience in qualitative data analysis. The needs of the client drive the type of information that is provided through the qualitative analysis: raw data, description, interpretation, recommendations based on the data, or a combination of all these things.

Quantitative Data Analysis. The quantitative data analysis is driven by the research and hypotheses from the research plan. We have a professional staff who are trained in a variety of descriptive and multi-variate inferential statistical techniques. While our staff has the ability to perform sophisticated analyses, we only use the level that is most appropriate for the project. For example, it may be that more sophisticated methods could be used, but a more sophisticated level may not be needed or required by the client. Other considerations, mentioned earlier, are the type of data available for analysis. Sometimes, the data may be nominal or discrete, and do not lend themselves to sophisticated techniques. For most survey data, the descriptive techniques usually include frequency distributions, percentages, and central tendency statistics are used, for example, to describe the population characteristics, opinions, perceptions, behaviors, attitudes and knowledge.

For data analysis, at a minimum the following steps are typically conducted by LeCroy & Milligan Associates:

1) Clean the data (check for missing data and accuracies)
2) Determine the data distributions of the major variables for the analysis (i.e., frequency distributions, histograms, central tendencies, skewness, etc.)
3) Based on the results from previous steps, adjust the analytic plan so the analysis is appropriate to the data
4) Create syntax for re-coding of variables if needed, for example to aggregate data, or re-code variables to address uneven distributions, etc.
5) If scales are used, calculated scale scores and determine scale reliability, and conduct item analysis to assess empirical validity
6) Conduct major analyses based on type of data, for example, correlational or inferential statistics.

Focus Groups and Interviews

Focus groups can provide rich qualitative information for program development, strategic planning, research and evaluation. Focus groups allow us to explore information needs and preferences in more detail than can be obtained with a questionnaire, plus they have some advantages over one-on-one interviews. Focus groups are sometimes used in lieu of one-on-one interviews because we can get more information from a group in a shorter period of time and check the reliability of the information at the same time. However, key informant interviews are often appropriate when you have a sensitive topic or want depth around particular key informant's perspectives.

A review of literature and key questions informs the development of a focus group or interview protocol. Our focus group protocol consists of developing a set a primary questions to be asked of every participant with a secondary level of questions to insure maximum participation by everyone. We assess and plan for the communication style, language and cultural characteristics of the groups we will be working with. For example, we have translated almost all of our protocols into Spanish and incorporate pre-testing, feedback and revision to insure appropriate language for local populations. If there is any doubt as to the need for Spanish language, we use a bilingual facilitator. If other languages are needed, we might use a program person to translate; for example in conducting a focus group with Vietnamese immigrants in a recent program evaluation, we teamed with the case manager to provide translation. We adapt our style for different age and interest groups, for example, in conducting groups with youth, we might make use of more visual aids and prompts. The development of an interview protocol is done in a similar manner to the focus group protocol.

We most often use two staff people conduct a focus group with groups of six to eight people. One of the interviewers is primarily charged with taking notes. A challenging aspect of any type of interviewing is capturing what is said. The best option is to have the interviews recorded and then have the interview reviewed and/or transcribed later.

In each new project that involves focus groups or interviews, the Evaluation Associate first develops a data collection plan and the protocols and reviews them with the evaluation team for feedback. The protocol is then revised and pre-tested before implementing with participants. . We also seek feedback from the client regarding our focus group or interview protocol.

Analyzing focus group and interview data for customer satisfaction research

Part of the research plan includes a data analysis plan that details the steps and methods for analyzing the data. The selection of these methods depends on the following:

- The needs of the client (primary research questions and type of information needed)
- The type of the data collected (e.g., qualitative vs. quantitative, process or outcome),

Qualitative Data Analysis. If the data collected is primarily qualitative, then content analysis may be used to organize the data around the major questions or themes in the narrative, or text under analysis. In content analysis we develop a scheme to classify information, so that the evaluator can itemize themes, ideas, patterns. Classification schemes can be in the form of checklists, index cards, summaries, or spreadsheets.

We have several staff with experience in qualitative data analysis. The needs of the client drive the type of information that is provided through the qualitative analysis: raw data, description, interpretation, recommendations based on the data or a combination of all these things. The analysis strategies can be transcript-based, tape-based, note-based, or memory-based. Depending on the needs of the client, we provide summaries of groups and/or transcriptions as requested.

Focus Group/ Interview Study Reports

LeCroy & Milligan's general approach to report writing is to understand and respond to the information needs of the audience for the report. This will determine the scope and format of the report. We have written reports that vary in their technical nature, and sometimes, we produce several reports for one project that address different audiences. For example, we may write a comprehensive report that is considered the main report, and then we may produce a short report or executive report for key decision-makers. In other cases, we have written both a technical report that specifically details the analytic results, and a report for lay audiences that only summarizes and interprets the findings.

In general, our reports would include all of the following components:

- A description of the research objectives and methodology used in the study
- A description of the limitations and challenges of the study and research design
- How we constructed the sample and demographic characteristics of the sample
- The data analysis approach and results
- The major findings
- Implications and Recommendations for actions.

Secondary source data

Customer or employee satisfaction can also be examined through looking at existing data from different sources. For example, we can examine informal unsolicited feedback from clients (letters of appreciation, donor information, testimonials), employee suggestion data, data from quality improvement team meetings, minutes of meetings, and so on. In the formation of the research plan, all potential data sources are identified and priorities for which data and methods are made together with the client.

Background Information/Work Samples

Examples of reports and projects can be found on our website, www.lecroymilligan.com, for example:

- *Maternal Health Report: Analysis of Focus Groups Among Women Who Received Inadequate Prenatal Care.*
- *Nevada Needs Assessment of Children with Special Health Care Needs—final report*
- *Healthy Families Arizona Qualitative Interview Study*
- *First Steps Arizona evaluation report*
- *OASIS Center for Sexual Assault and Relationship Violence program evaluation*